

DCX

RECIPE FOR SUCCESS

DCX Onboarding Checklist





The Right Ingredients for the Perfect Start

The Kickoff is the day your Team Member officially starts working for you. Directly after this meeting, you will receive the team member's contact information for direct communication so you can begin onboarding them to your team. For a smooth transition, we recommend having the below ready for the kickoff.



- ✔ Set up the necessary accounts and access (email, communication tools, CRM system, etc.)
- ✔ Gather all relevant onboarding materials, including policies and procedures.
- ✔ Send a personalized welcome email with company values (bonus points for scheduling a virtual tour of your office!)
- ✔ Set up a 15-minute meeting each morning for the Team Member and their Direct Manager for the first 15 days.

Training



Set Expectations. What would you like your new team member to know how to do after...

- ✓ Week 1:
- ✓ Week 2:
- ✓ Week 3:
- ✓ Week 4:



Take advantage of onboarding resources available through your platform.



Set up Shadow Sessions so your team member is able to watch the process in action and ask questions real time.



Let your Team Member record training so they can utilize our Process Documentation team who will make a step-by-step PDF from the video.



- ✓ For best results, focus on one process at a time for a recording around 20 minutes or less. Limit questions and focus on each step of the process.



Communication is Key

Your Customer Success Manager will reach out to you around 2 weeks and 4 weeks after kickoff with an invite to meet. If busy, an email update is still a great way to stay in touch! These are check-ins to ensure everything is on track, but you are always welcome to contact your CSM with any questions. The following are some topics to consider for check-ins:



- How is your experience so far with the process of remote onboarding?
- How is the Team Member performing so far? Are expectations being met?
- Are there any concerns with how training is going?
- Establish any action items needed.



In Summary

Don't hesitate to reach out to your Customer Success Manager. DCX has solutions if anything should arise. We've done this over 1000 times with great success and would love to assist however we can for a smooth onboarding. If you have questions or concerns, we've got answers! We also have a wonderful Support team that you can reach through email at support@delegatecx.com. The following are what we consider the 3 most important ingredients for success:



1. Prepare for Kickoff
2. Meet with your DCX Team Member EVERY day for the first month
3. Make training a priority

The DCX logo is rendered in a bold, white, sans-serif font. The letter 'X' is stylized with a small white diamond shape at its center. The background is a dark red-to-purple gradient with abstract geometric shapes in shades of blue, yellow, and pink.

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